

6/15 Consortium Development Call Minutes

1) Target Markets

Here is the list of Target markets:

- Recordkeepers
- F/As and B/Ds
- Fund Companies
- CPAs
- Payroll Firms
- Law Firms
- HR professionals
- Other B to B companies i.e., small business such as doctors' offices etc.

We are already on track with respect to the RKs- presentations by ECO, Ann's monthly calls, meetings.

For B/Ds, we'll start by focusing on Edward Jones as they are the most TPA friendly, have a similar service model to TCG, are the top B/d for most of the TCG members and we have relationships with John Davis and Greg Reynders.

CPAs

We decided focus on the CPA channel. We believe that this is an untapped market we can convert to show ROI to members.

Training and Reaching out to CPAs

- Bob already has had a lot of success with this channel. He does training for the low level accountants; he asks new clients who their CPA is and calls them to introduce himself and tell them that if they have any questions, they should call him. Bob did note that this took time and didn't happen quickly. However, it was worth the investment as he gets referrals from CPAs and they often will help retain the plan.

CPE CE

- Pat has hired a guy who is working to get Pat's firm registered to be a national CPE provider. He will find out how to get presentations approved for CE and how to ensure we do the proper reporting.
- We can take existing presentations i.e., Bobs CPA training, and have then approved for CE
- We think that any CE training we do should be at least 2 hours so folks will actually call in.
- We need to see what members may already have that can be approved.
- We'll focus on local, smaller TPA firms

AICPA

- Ann will look into the various conferences to see which ones would be the most appropriate for us.
- We may have more opportunity to speak at smaller, regional conferences. There are state conferences we need to look into.

- Once we've fleshed this out, TCG website can have a page devoted to CPAs and how we can partner with them.

2) NAPA 401k Summit (Sept. 12-14) and Weath@Work (Oct. 24-26)

- We are exhibiting at this conference. Debbie and Theresa are attending and Deb's sales guy will be there too.
- We reviewed the graphic for the booth-very positive feedback
- Booth collateral- 4 page brochure, map, TCG articles, ant-eater give-away.
- Can create TCG branded limits card or TCG coasters
- We will have someone's laptop on the table running the revolving brochure and also to have access to the website
- Ann will ask Peter who he uses for corporate swag and we'll also ask TCG.

3) Social Media Strategy

- Start with biggest bang for buck- 1 TCG branded article per month
- Writer to engage with one member each month to write TCG article- writer interviews the SME
- Each firm volunteers to do one article with the writer
- Ann meeting with writer 6/21
- Bob will be the first "author"- Plan Audits for July
- Pat will go next in August and work with the writer to create an article based on his TPA Alpha concept
- Members- come up with topics or do you need help?
- Once we get this going, we can look at existing pieces that members have- we'll need to create a process for this.

4) Other

- Bob currently works with Law firms how ask him to do documents for them
- Deb is meeting with a couple of payroll firms to build relationships with them

5) Next Call

- Ann will send a Doodle for the next meeting
- We will review and approve the revised marketing ng plan
- Brainstorm list of topics for articles
- Other topics the CD team comes up with.